



Strategic Plan

2018-19 to 2021-22

May 2018

Table of Contents

Executive Summary	3
Introduction	4
Club Service	6
Youth Service	7
International Service	9
Community Service	10
Vocational Service	11
Membership	12
Fundraising	14
Foundation	16
Public Image	17
Other	18

Rotary Club of Calgary Heritage Park Strategic Plan Summary - 2018-19 to 2021-22

Club Service

Membership retention.
 Increase member engagement and fellowship.
 Increase communications within club at all levels.

Community Service

Define and execute a multi-year 'local' project.
 Work with other rotary clubs on a joint project.
 Find more opportunities for sweat-equity projects vs just funding provisions.

International Service

Make contributions where we "move the needle".
 Support projects with club member direct involvement and/or other local Rotary clubs.
 Support only projects in the six Rotary International focus areas.

Vocational Service

Ensure original Rotary Vocational objectives are well understood internally.
 Seek out internal opportunities to share our vocations and mentor others.
 Seek out professional content that we could deliver to locally.

Youth Service

Strengthen and maintain relationships with our chosen youth groups and schools.
 Enhance Youth awareness and protection compliance for whole club.
 Promote and support Earlyact, Interact and Rotaract clubs.

Fundraising

Use both types of fundraisers – provide service for money; open your wallet.
 Define a target budget for fundraising to determine the number of fundraising events.
 Create unique approaches to fundraising events.

Membership

Monitor current and evolving membership needs and foster engagement.
 New member orientation – mentorship plan.
 Growth that supports strategic plan, engagement and diversification.

Foundation

Maintain \$100US per capita contribution to Annual Fund.
 Increase number of Rotary Direct participants.
 100% of club members give \$25 or more per year.

Public Image

Define RCCHP's image/brand.
 Create visibility in the community by promoting and highlighting the great work RCCHP does.
 Connect and keep in touch with current and past RCCHP "friends".

Other

Single major global grant RCCHP project every 3 years.
 Develop and implement Heritage Park "project".

Introduction

The driver for updating the RCCHP strategic plan was that the existing plan, covering the period 2015-2018, was expiring. A new plan covering the Rotary years 2018-19 to 2021-22 was therefore developed.

The strategic planning process followed in building this plan was developed by a Steering Committee comprising of the District 5360 Strategic Planning resource and the RCCHP Vice President Elect, Vice President, President Elect and President.

The chosen format for the strategic plan was one that identifies the priorities for each of the functional or service areas of the club. The plan was not intended to include strategies to implement and achieve the priorities set. That will be left with the service area and other committees who will strategize each year as how they might best attain the priorities the plan sets for them. The plan is about confirming WHAT we want to do over the next few years, NOT how we do it.

For the purposes of the planning process the functions of the club were broken down into ten "service areas" including a catch-all or "other" category. The service areas are;

- Club Service
- International Service
- Community Service
- Youth Service
- Vocational Service
- Foundation
- Public Relations
- Fundraising
- Membership
- Other

The question asked of club members, for each of these service areas, was;

"What do you believe to be the top priorities, in terms of 'areas of focus' for each service area, over the 2018-19 to 2021-22 Rotary years."

A three-part process was used to allow for effective member input and provide sufficient time to complete the task.

The graphic over illustrate the principal tasks.

1. The Club service committees develop an initial list of what they believe should be their service area top 3 "areas of focus" or priorities over the following 3 Rotary years.

2. At a regular club meeting, dedicated to the task, club members confirm and further develop the service area "areas of focus".

3. At a special 3-hour planning session, club members;

- Review the priorities established to date for each of our club's functional areas
- Discuss and clarify any questions related to the work to date
- Identify any possible additional priorities
- Rank the priorities identified to identify the top 3 priorities for each functional area

The top 3 priorities formed the basis of the strategic plan but all other priorities and any pertinent discussion/notes (and some of those inevitably were "how to" items) were included in the body/appendices of the plan.

It is to be noted that the top 3 priorities listed in bold type under each service area are the "deliverables" of this strategic plan. Those priorities set the direction for the service committees over the duration of the plan. The comments listed under each priority and all other information recorded in the plan is for information purposes only.

Club Service

1. Membership retention.

- a. Target 80% new member retention over 3 years.
- b. What is the current new member retention?
- c. Have someone from club service on the membership committee.
- d. Assign mentors to new members.
- e. Link retention activities to PE membership responsibilities.

2. Increase member engagement and fellowship.

- a. Have flexible and / or alternative meeting programs.
- b. Have seating plans at fellowship events so people don't just sit with their friends.

3. Increase communications within club at all levels.

- a. Give an update of Board meetings and All President's meetings.
- b. Define our intention and deliverables with the Standard? What members enjoy being the reporter?

Other Notes & Comments

Possibly better chance of retention if we induct younger members in groups (Club in a Club).

Purposeful membership is important to the role of club-service.

Have small group firesides. Keep new members involved and also build on the knowledge of senior members.

Celebrate milestones of members. Have a representative from Club Service in Membership, Fund raising and PI committees.

Have exit interviews. Can we share information when members leave? Perhaps members leaving can address the club where we can thank them.

Have varied themes. Guess who's coming to dinner is a big hit.

A club Assembly could be held in the same format as the strategic planning Prep meeting.

Give a few minutes for Committee Chairs to give a synopsis of their meetings to the club. Report on District events. Communication with members will make them feel engaged.

The Bulletin should be out in time. Possibly more information on District and International. Possibly send the Bulletin to all spouses and to members who have left but choose to stay connected.

Youth Service

- 1. Strengthen and maintain sustained 2-way relationships with our chosen youth groups and schools to enable rotary program engagement with Youth.**
 - a. Youth is defined as young people up to the age of 30. Programs that are vocational development for youth in the 18-30 year old range would be the focus of our vocational services committee, while Youth Services would focus on rotary programs such as Rotaract and volunteering.
 - b. Continuation of current groups: GW Skeene, Bishop Grandin high school, Bridge Foundation for Youth.
 - c. A key focus for finding qualified students for our Rotary programs is through a strong relationship with a high school. The committee must develop and maintain a strong relationship with Bishop Grandin as our chosen school.
 - d. We will continue to be involved in the following rotary programs
 - i. Rotary Youth Leadership Awards (RYLA)
 - ii. Rotary Youth Program of Enrichment (RYPEN)
 - iii. Long term Youth exchange program (YEX)
 - iv. Rotary Adventure programs (Citizenship, Agriculture, northern experience etc.)
 - e. With all the youth that have been supported by our club over the years, there is an opportunity to keep all these students in communication with our club over the years – to enable their continued Engagement – Youth Services should create and maintain a database and a communication plan for all these participants.
 - f. Ensure feedback on the experience from program participants.
 - 2. Enhance Youth awareness and protection compliance for whole club, leading in Rotary values of safety for the vulnerable sectors we engage with.**
 - a. The goal is for all Rotarians and participants to have successfully completed the compliance training and certification that Rotary International has in place to ensure the safety of all vulnerable people that we work with.
 - b. Our club can lead by ensuring we have good systems and processes to track and support our members adherence to the requirements for safety of the vulnerable sectors.
 - c. The Youth Service committee will lead this effort on behalf of all committees or RCCHP as youth represents the largest (but not only) vulnerable sector that we work with.
 - 3. Promote and support Earlyact, Interact and Rotaract clubs to develop Rotary youth programs.**
 - a. We are currently involved in an Earlyact program
 - b. There are opportunities for us to develop Rotaract and Interact programs. Formation of these clubs will allow us to leverage the rotary brand and name to enhance and promote volunteering in schools and university students.
 - c. Opportunities should be explored in areas that are in our region – some suggested ideas: Tsuu T'ina Youth, Mount Royal University, Bishop Grandin High school.
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Youth Service (cont.)

Other Notes & Comments

What are the distinctions between youth groups and schools, is it targeted schools? Should we consider feeder schools as part of the how? Youth groups would include Rotary sponsored Early Act, Interact and Rotaract as well as youth groups such as Bridge Foundation.

What is our targeted selection philosophy? How do we define success? To be determines – proximity to Heritage Park?

Alignment of what we do with District developments. How do we identify the right candidates? Hull homes services, do we add to what we are doing now? Where practical we can seek out additional relationships.

YEAH database - make sure the necessary clearances and training takes place. Vulnerable sectors and youth has the greatest exposure, although it's broader, Alzheimer's patients, etc. It is a priority/risk management issue.

Importance of developing how we respond to other youth issues, home, school, etc. - what is our next course of action. Can be developed on an ad hoc basis

Priority #1 is about finding candidates to participate, #3 is about supporting those clubs.

International Service

1. **Make contributions where we “move the needle”.**
2. **Support projects with club member direct involvement and/or other local Rotary clubs.**
3. **Support only projects in the six Rotary International focus areas.**
 - a. Water and Sanitation
 - b. Education
 - c. Economic and Commercial Development
 - d. Maternal and Child Health
 - e. Disease Prevention and Treatment
 - f. Conflict and Peace Resolution

Other Notes & Comments

Focus annually on 1 to 3 areas only as we don't have a lot of funds

Do we focus on multiple projects or just do grants

Mixture of sustainable projects vs just in time

World disaster relief is this Board, committee or member contribution responsibility

Projects need a Champion to succeed as well as trustworthy source at receiving end

Noted Shelter Box disaster relief does not fall under the 6 areas of focus.

How can the committee be proactive in identifying major projects that align with the areas of focus and leverage global grants.

Determine that we are satisfying what the club wants in previous projects like PV and Guatemala.

If we engage in a global project, we need club participation in satisfying the responsibilities. Or Rotarian from other Calgary club

Have consistent approach in profiling and reporting on the project.

- Goal
 - Results
 - Options on approach
 - Commitment
-

Community Service

1. **Define and execute a multi-year project.**
 - a. Should be a 'local' project.
 - b. Possibly with South-West Calgary Community Resource Centre.
 - c. Investigate the potential of becoming a member of Friends of Fish Creek.
2. **Work with other rotary clubs on a joint project.**
3. **Find more opportunities for sweat-equity projects in SW Calgary.**
 - a. Clearly define roles, responsibilities and expectations so members make informed decisions re participating.
 - b. Sweat equity projects should have dates published well in advance and added to website.
 - c. Stagger the dates for sweat equity, as opposed to lumping close together.

Other Notes & Comments

If possible, have the recipient of our labors call out to RCCHP if any other projects require our assistance. This could allow both parties to have 'ownership' and thus increase our club's visibility in the community.

With the SS Moyie in dry dock, is there the potential for sponsorship (hull paint, fixture upgrade)?

Ronald McDonald House meal prep; Calgary Food Bank; Food hampers at SWCRC.

Prepare and serve a lunch / prepare sandwiches at The Mustard Seed

Engage with a new immigrant organization.

Habitat for Humanity

Women in Need - could we volunteer at their retail store?

Indigenous challenges, water issues. Could be supported by Global Grant, partnerships with other clubs. Having the right connection for sustainment is very important.

Sweat equity is important to promote as high value to new members or members who have not had an opportunity.

Vocational Service

1. **Look inward to ensure original Rotary Vocational objectives are well understood.**
2. **Seek out internal opportunities to share our vocations and mentor others.**
 - a. Fireside chats, lunch and learns etc.
 - b. Capture skill base.
3. **Seek out professional content that we could deliver to local entrepreneurs/early career/retraining to guide and advise.**

Other Notes & Comments

Strategy – capture district grants for scholarships (less competition competing with project grants).

Alignment with budding local entrepreneurs, micro loans, mentorships.

Seek out retraining opportunities eg. Oil patch to data management

Transition career planning – SAIT/Rotaractors/YWCA/ Bow Valley College, work with placement services.

Early career support – help find/carve career path. Demystify

Support strategies to develop eg. Steps to apprenticeships vs journeyman, classroom setting – funnel to mentorship

Helping young people transition into working world – apprentice adults

Mentor internally – prep for retirement, create network of peers, career discussions with club

RI Guiding Principle – Using the skills of our club members we will assist in solving the challenges and problems of our community.

New Canadians Mentorship:

- i. Leverage within existing organizations
- ii. Cultural/career guidance
- iii. Retraining

Do we explore vocations within our club. Professional content - leverage programs that exist today, no need to re-invest the wheel and reinforce the connection that the organization has with Rotary.

Membership

1. **Establish touch-points that give insights into the current and evolving needs of our membership and champion initiatives that foster engagement.**
2. **Focus on membership growth that:**
 - a. Aligns with our Strategic Planning update (May 2018).
 - b. Positively contributes to the high level of engagement we enjoy in our club.
 - c. Diversifies our member base. Diversification might include gender, age, profession and culture.
3. **New Member Orientation – Mentorship Plan**
 - a. Develop a formalized mentoring program for involved members to support less active or new members.

Other Notes & Comments

Membership Chair – 2 year term, reports to P/E on Board.

Leverage materials and processes that are currently available, no need to re-invent the wheel. Robin's marketing resources, RI and the District membership training manual that was provided and is available on the District 5360 website.

Value openness and create space and willingness to embrace the value and ideas that new members bring to the club.

Engage new members in committees and chairing club initiatives that are appropriate for their time in Rotary, bottom-line is get them engaged early.

Create opportunities for new members to get to know other members, encourage membership to change-up seating arrangements.

Overall feedback is that we do not need a specific membership maximum. It is important to get the word out about our club and that we explore options on how to do it. Example might include: District membership initiatives, alliances with non-profits, churches and other associations, lunch and learn with companies.

Have thorough and welcoming conversations with prospective members.

Create a process to follow-up with all new members and existing members as a check-in on their current engagement and new opportunities to contribute.

Diversification might include gender, age, professional and cultural mix.

Bring focus to the natural evolution of Rotaract members into Rotary.

Membership (contd.)

Develop a formalized mentoring program for involved members to support less active or new members. The plan is focused on the needs of the new member, the selection of the mentor is a Rotarian that the new member views as a good fit for him/her and who offers a broad view of Rotary through experience and active engagement.

Create casual on-boarding and education opportunities for new members, fireside chats, social evening at a pub, be creative and consider our audience, ask them what they might like.

Encourage sponsoring members to stay close to the new member that they sponsored.

Resources:

[http://rotary5360.ca/page/membership-resources:](http://rotary5360.ca/page/membership-resources)

- *Priority #1 Plus Workbook*
- *Membership Resources available through Rotary Int.*

Want good Rotarians, willing to participate.

Dig up old orientation - build on work done.

Fundraising

- 1. Use both types of fundraisers – provide service; open your wallet.**
 - a. Majority of participants described a preference for fundraising based on members working to create value (it's about service).
 - b. Some members prefer the idea of opening their wallets to “pay” for fundraising, one even suggested a cash call once in a while.
 - c. Prioritize using dollars raised versus effort expended.
 - d. Consider scheduling member-pay events every other year.
 - e. Note: member-pay events compete with Foundation donations.

- 2. Define a \$ target and events for fundraising.**
 - a. Start with what we want to support and budget and plan events from there.
 - b. Budget conservatively, e.g., casino revenues have been trending down.
 - c. Take stress out of trying to have too many fundraising events – avoid fundraising burnout.
 - d. Carry over any funds that exceed the budget.

- 3. Create unique approaches to fundraising events.**
 - a. Consider having a specific cause(s) to be supported by the fundraiser
 - b. Ensure the event is fun and enjoyable – something to draw people out. Consider sports-related, music-related, special guest speaker.
 - c. Consider a joint fund-raiser with Heritage Park. Is there a common cause we could work together on and strengthen the relationship?
 - d. Look for ideas from other clubs outside Calgary, even internationally.
 - e. Identify other sponsors to collaborate with.
 - f. Sell products (beef jerky has been very successful).

Other Notes & Comments

Should RCCHP have a fundraising committee to perform the strategy activities referenced above?

Look at what we are confident in raising, what we have as a budget, look at the gap and identify fundraising opportunities that engages the membership.

Fundraising fatigue...what is our funding goal over 3 years, these are the events that we can rely on, surplus can go to reserve fund, and we can draw from when needed.

Legacy - add another fundraiser to support?

Give direction to fundraising, what is the target budget? Proactive and controlled for the club and committees.

Fundraising (contd.)

Charitable status is contentious issue, pros and cons. Many of our events would not benefit from charitable status.

We need a strategy to increase our fundraising returns. Consider naming a specific allocation and commitment to where the raised funds are being directed.

Leverage of Heritage Park relationship?

On a per-capita how do we compare to other clubs in Calgary?

What draws our energy and hearts to get behind something that we rally behind?

We have a good sense of \$\$\$ from experience, casino, golf, art-sale.

Do we not partner with ARF?

Foundation

- 1. Maintain \$100US per capita contribution to the Annual Fund**
 - a. Club members understand Rotary Foundation: explain return on investment, grants connection, difference between Rotary Foundation and Calgary Rotary Club's Foundation.
 - b. Clarify role of Rotary Foundation versus other fundraising initiatives.

- 2. 100% of Club Members contributing**
 - a. Improve club understanding of how to give.
 - b. Increase visibility through more frequent and improved communication.
 - c. Investigate possibility of adding to annual fees.
 - d. Make it more fun and part of on-going meeting agenda.

- 3. Increase the number of Rotary Direct participants**
 - a. Improve club knowledge of how to give through Rotary Direct.
 - b. Recognize people who sign up.

Other Notes & Comments

Emphasize the benefits in support of the goals.

Can we take donations from dues, how can we make it easy? What are the pros and cons to the options?

It's important to understand the benefits of both the RI Foundation and the Calgary Rotary Clubs Foundation.

Include Calgary Rotary Clubs Foundation as part of Foundation mandate?

Public Image

1. **Define RCCHP's image/brand.**
 - a. The key to having a clear and consistent message we portray to everyone.
2. **Create visibility in the community by promoting and highlighting the great work RCCHP does.**
 - a. Opportunity to create visibility to Heritage Park visitors.
 - b. Rotary Meets here sign.
 - c. Ensure benefactors mention RCCHP at their locations and on their websites and newsletters.
 - d. Look at partnerships with other companies, charities and organizations.
 - e. Partnerships with local media, community newsletters.
 - f. Pop up sign or banner that we can put up at events we host, events that we participate in, or sweat equity projects we volunteer at.
 - g. More user friendly website, or possibly set up a web page with who we are and where we meet. Look at securing a web address rcchp.com?
3. **Connect and keep in touch with current and past;**
 - a. Members (create member profiles that we can put on our website), exchange students, funding recipients, other Clubs- Interact, Rotaract, Early-act, charities.
 - b. Get additional information and pictures from each committee to highlight their work.

Other Notes & Comments

Give out RCCHP information/ invitation cards with social media links- business card format to prospective interested individuals with who we are, where and when we meet, section for a contact's name and phone number they can contact if they are interested in coming out to a meeting.

Maintain a presence on social media- we are currently engaged with Facebook, Instagram and Twitter. This is a great opportunity for us to create a web presence and allowing potential members to find us and what we are about before they decide to check us out.

Develop RCCHP specific elevator speech.

Have we determined what our community is?

How does our public image align with the RI convention in 2025, what do we want to be known as, important to qualify in advance of the conference.

Other

1. **Single major RCCHP project every 3 years.**

Suggestion is that RCCHP should lead a major project that would qualify for a global grant, every 3 years. Could be good opportunity to work with other clubs. What is the scope and financial driver for the major project?

2. **Develop and implement Heritage Park “project”.**

Concept is that RCCHP need to have a more visible presence in Heritage Park – possibly through the development of a “project” within the park. Through such a project we can develop closer ties with the Park. Other possibilities include the HP President re-joining club as a member, possible Rotary Days at the Park, more effective use of Rotary Hall and the idea of HP hosting a major event for the RI Convention. Suggestion is that small committee might be charged with entering into discussions re above with HP.

Other Notes & Comments

Do sufficient due diligence on organizations we plan to support to ensure that the funding we are providing makes a difference and is not a drop in the bucket to the organization. Might involve comparing notes with other clubs regarding suspected mass mailing solicitation.

Utilize the service area priorities we have developed in selecting projects we will support - as opposed to simply responding to requests received. Supporting another clubs project that is in an area of high priority for RCCHP would be an option if we have not been able to identify a suitable project ourselves.